

# Preparing for life milestones

Experts and resources recommended for each step



## FIANCÉ (FIRST MARRIAGE)

**Experts**  
Family law attorney(s)

**Documents**  
Prenuptial agreement



## SPOUSE

**Experts**  
Estate planning attorney,  
financial planner,  
insurance specialist

**Documents**  
Will and/or trust  
agreements, power of  
attorney(s), financial plan,  
life insurance policies



## DIVORCED SPOUSE

**Experts**  
Mediator, family law  
attorney, financial planner

**Documents**  
Marital settlement  
agreement, divorce decree,  
and look to update items  
from the "spouse" category  
with any applicable changes



## FIANCÉ (SECOND MARRIAGE)

**Experts**  
Family law attorney(s),  
estate planning attorney,  
financial planner

**Documents**  
Prenuptial agreement, will  
and/or trust agreements,  
financial plan, life  
insurance policies



## MINOR CHILDREN

**Experts**  
Estate planning attorney,  
financial planner,  
insurance specialist

**Documents**  
Financial plan, 529  
plan/education savings  
documents, guardianship  
documents, will and/or trust  
agreements, life insurance



## AGING PARENT

**Experts**  
Estate planning attorney,  
trusted personal advisor  
(clergy, therapist), financial  
planner

**Documents**  
Will and/or trust, power  
of attorney, life insurance  
policies, long-term care  
plan (for parents)



## ADULT CHILDREN

**Experts**  
Estate planning attorney,  
financial planner

**Documents**  
Will and/or trust, power  
of attorney, life insurance  
policies, long-term care  
plan (for you)



## BUSINESS PARTNER

**Experts**  
Business lawyer(s), banker

**Documents**  
Business succession plan,  
life insurance policies